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ABSTRACT

This first of nine related reports describes the procedures used in a study which gathered data on 80 research interviews in seven medical libraries. The study was conducted (1) to identify verbal and nonverbal behaviors that facilitate, maintain, or impede information exchange in interviews between search intermediaries and library users requesting online bibliographic searches: (2) to identify tasks that are accomplished by the librarian to facilitate information exchange: and (3) to objectively code videotaped research interviews in terms of the extent to which those tasks were accomplished. Chapters address the choice of libraries and the development of procedures, interview schedules, and questionnaires: procedures in each library: stimulated recall procedures with requesters and with librarians: questionnaires and permission forms: and the time table and staff commitments. Appendices contain sample forms, questionnaires, and other supporting materials. (FM)

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ED205182

PROGRESS REPORT

(Covering May 1, 1979 to January 15, 1980)

by

Wayne W. Crouch

and

Pauline A. Atherton

Co-Principal Investigators

February 1, 1980

A report of the Presearch Interview Project
(NLM Grant No. 1 R01 LM03074)

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LIST OF REPORTS OF
THE PRESEARCH INTERVIEW PROJECT
(NLM Grant No.1 R01 LM03074-01)

Date	Title	Author(s)
Feb. 1, 1980	Progress Report for May 1, 1979 to January 15, 1980	Crouch and Atherton
March 7, 1980	Codebook and Frequency Distributions for Quantifiable Data	Tessier and Fargnoli
July 4, 1980	Analysis of Verbal Behaviors in the Presearch Interview: Codebook with Instructions for Transcribing Interviews	Crouch and Lucia
April 1981	Descriptive Account of Stimulated Recall Sessions with Requesters that Followed Presearch Interviews	Wargula, Lucia and Fargnoli
April 1981	Satisfaction Measures in Presearch Interviews	Tessier
April 1981	Verbal Behaviors of Librarians in Presearch Interviews	Crouch
April 1981	Nonverbal Behaviors in Presearch Interviews	Genova
April 1981	Tasks Performed by Online Searchers in Presearch Interviews	Cochrane
May 1981	Executive Summary, Project Bibliography, and Sample Data	Cochrane

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I. Introduction

The objectives* for the project during this period were to obtain

1) 60 video and audio records of presearch interviews from at least four on-site locations,
2) the subjective evaluations of the "success" of the interview from the librarians and requesters** immediately following each interview (using written questionnaires),
3) audio records of "stimulated recall" sessions with each librarian and each requester separately a) to discuss "tasks" that may be essential for a successful interview and b) to identify verbal and nonverbal behaviors that facilitate or interfere with information exchange during the interview, and
4) each librarian's estimate of the frequency of occurrance of "tasks" that we hypothesized to be important to the success of presearch interviews (using a written questionnaire).

The objectives were met by January 15, 1980, as planned. The report describes the procedures that we used and the data that were gathered.

In brief, we visited seven medical libraries, videotaped 82 presearch interviews, and obtained associated audiotapes of "stimulated recall" sessions

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*These objectives correspond to the first four steps in the research design which was described on page 22 of the proposal. Different wording is used here to reflect our decision 1) to include all discussion of "tasks" with each requester in the "stimulated recall" session and 2) to use a questionnaire to elicit estimates of frequency of occurrence of "tasks" from the librarians. The information obtained is the same as described in the proposal; the procedures for obtaining it were slightly different from what we anticipated when the proposal was written.

**The terms "librarian" and "requester" have been adopted instead of information professional (IP) and information needer (IN) as were used in the proposal.

and responses to our questionnaires for most. The libraries are associated with two major medical centers, a specialized hospital (Veteran's Administration), two medical colleges, and two city hospitals. The data are now ready for analysis; working copies have been made of the videotapes and the audiotapes, and the questionnaire data have been stored in machine readable form.

II. Choice of Libraries

In planning the project prior to submitting a proposal, we contacted nine medical libraries and asked if they would be willing to serve as sites for gathering data. Figure 1 lists those libraries. As indicated in the figure, four agreed to participate. After the project was funded, the Norris Medical Library at the University of Southern California was excluded because of the travel expenses required for us to go there. The Health Sciences Library at Hartford Hospital was also excluded because it appeared that too few searches would involve an interview of the type we are studying. This was the case in part because the library provides extensive "clinical librarian" service.

Since we wanted to obtain data from at least four sites, additional libraries were contacted as shown in Figure 2. We tried to include different types of libraries, librarians with varying amounts of experience, and different types of requesters. Five additional libraries agreed to participate and were included in the project. The end result was a set of libraries in diverse settings with librarians and requesters of varying experience.

An additional characteristic of the libraries was whether they used a computer terminal during the presearch interview. Most of the libraries we contacted did not, but one (Veteran's Administration Hospital Library/Buffalo) did for all searches and another (Archibald Church Memorial Library/Northwestern University) sometimes did. We will examine in a very exploratory way the differences between interviews that do and do not include the use of a terminal.

Figure 3 lists the characteristics of the site libraries. Figure 4 shows the experience of the librarians in terms of how long they had been doing computer-based literature searching. Figure 5 shows requester status, and Figure 6 shows requester responsibilities.

Libraries were chosen as potential sites on the basis of Professor Atherton's or Mrs. Wargula's knowledge of computer search services offered there and on the basis of recommendations by various medical librarians, recommendations by staff members of the New York and New Jersey Regional Medical Library, and information from the Medical Library Association Directory. Our original plan to stay three weeks at each library was revised to one week in order to reduce our intrusiveness in the normal activities of site libraries. Also, the shorter stay in each library allowed us to gatner data at more libraries and with more librarians.

Figure 1. Libraries Contacted Before Submitting Proposal

Library	Initial Response	Final Decision
Norris Medical Library University of Southern California Health Sciences Campus 2025 Zonal Avenue Los Angeles, California 90033	Yes	No
Library of the Health Sciences University of Illinois at the Medical Center, Chicago P.O. Box 7509 Chicago, Illinois 60680	Yes	Yes
Health Sciences Libraries Hartford Hospital Hartford, Connecticut 06115	Yes	No
Upstate Medical Center Library State University of New York 766 Irving Avenue Syracuse, New York 13210	Yes	Yes
The Edward G. Miner Library School of Medicine and Dentistry The University of Rochester 601 Elmwood Avenue Rochester, New York 14642	No	
Schaffer Library of Health Sciences Albany Medical College of Union University 47 New Scotland Avenue Albany, New York 12208	No	
The University of Connecticut Health Center Lyman Maynard Stowe Library Farmington, Connecticut 06032	No	
Biomedical Library The Center for the Health Sciences University of California, Los Angeles Los Angeles, California 90024	No	
Medical Library 2411 Holmes University of Missouri-Kansas City Kansas City, Missouri 64108	No	

Figure 2. Libraries Contacted During the Project

Used as a Site

Archibald Church Medical Library
Northwestern University
303 East Chicago Avenue
Chicago, Illinois 60611

Ellis Hospital Library
1101 Nott Street
Schenectady, N.Y. 12308

Hahnemann Medical College Library
245 North 15th Street
Philadelphia, PA 19102

Medical Library
Veterans Administration Hospital
3495 Bailey Avenue
Buffalo, New York 14215

New Rochelle Hospital Library
16 Guion Place
New Rochelle, New York 10802

Not Used as a Site

George Washington University
Paul Himmelfarb Health Science
Library
2300 Eye St., N.W.
Washington, D.C. 20037

Health Sciences Library
State University of New York
at Buffalo
Stockton Kimball Tower
Buffalo, New York 14214

Mt. Sinai School of Medicine
Fifth Avenue and 100th Street
New York, New York 10029

Library of Sciences and Medicine
Rutgers University
P.O. Box 1029
Piscataway, New Jersey 10054

University of Washington Libraries
Health Sciences Library SB-55
Seattle, Washington 98195

Yale Medical Library
333 Cedar Street
New Haven, Connecticut 06510

Children's Hospital
219 Bryant Street
Buffalo, New York 14222

Figure 3. Characteristics of Site Libraries

Library	Setting				Terminal Used During Interview	Number of Librarians Videotaped
	Medical Center	Medical College	Specialized Hospital	City Hospital		
Upstate	X				No	2
Ellis				X	No	1
VA/Buffalo			X		Yes	6
U of Illinois	X				No	5
Northwestern		X			Some	2
Hahnemann		X			No	2
New Rochelle				X	No	1

Figure 4. Experience of Librarians Videotaped in Terms of How Long They Had Been Doing Computer-Based Literature Searching (N=19)

Library	less than one year	one year	two years	three years	more than three years
Upstate			X		X
Ellis					X
VA/Buffalo	X	X	XX	X	X
U of Illinois	XX		XX		X
Northwestern		XX			
Hahnemann		X			X
New Rochelle			X		

Figure 5. Requester Status

	Faculty-staff	Student	Other	Not known
All Requesters (N=82)	35	28	17	2
Requesters Who Participated in a Stimulated Recall Session (N=67)	31	22	14	0

Figure 6. Requester Responsibilities

	Academic	Both Academic and Clinical	Clinical	Other	Not known
All Requesters (N=82)	28	15	25	12	2
Requesters Who Participated in a Stimulated Recall Session (N=67)	24	11	23	9	0

III. Development of Procedures, Interview Schedules, and Questionnaires

The objectives of the project required that the following procedures, interview schedules, and questionnaires be developed:

- overall procedures for scheduling presearch interviews to be videotaped, associated administration of questionnaires, and "stimulated recall" sessions
- procedure for videotaping each interview
- questionnaire to obtain a measure of the requester's satisfaction with the interview
- questionnaire to obtain a measure of the librarian's satisfaction with the interview
- interview schedule for the "stimulated recall" session with the requester
- interview schedule for the "stimulated recall" session with the librarian
- questionnaire to obtain each librarian's estimate of the frequency of occurrance of "tasks"
- questionnaire to record characteristics of each requester
- questionnaire to record characteristics of each librarian
- permission form for each requester
- permission form for each librarian

Pretesting

Initial pretesting of each of the above was done with librarians from the Syracuse University area, students, and staff members and with presearch interviews at a neighboring college library. A final pretest was conducted at the Upstate Medical Center Library. Changes and refinements were made as a result of the initial pretesting, but the procedure, schedules, and question-

naires that we used for the final pretest proved well suited to the objectives of the project. We found a potentially serious problem in obtaining enough interviews to videotape, but otherwise, only minor wording changes were needed in procedures, schedules, and questionnaires.

Scarcity of Interviews to Videotape. Difficulty in having presearch interviews to videotape at the final pretest site (Upstate) was due to very few requesters appearing. We had not conducted a study of request frequency prior to gathering data in the library, but the librarians said that there were unusually few requesters while we were at the site. We could find no explanation for the lull. For four days our camera was very unobtrusive, and we doubt that our presence had any effect on potential requesters. For one day our camera was in a very prominant location, and we did feel that potential requesters might have been hesitant to make requests. We tentatively decided that at future sites we would ask the librarians to solicite requesters if a similar problem developed, and at several libraries the librarians were asked to seek out requesters who had real needs for searches and who were willing to participate in a presearch interview.

In planning the project we had hoped to videotape presearch interviews that occurred when a requester came into the library entirely at his own initiative. Obviously, that would have provided interviews that were more "natural" than those which were arranged. However, the obtrusiveness of a videotape camera being present and the necessity of explaining what we were doing and obtaining written permission already detracts from the naturalness. We decided that arranging the interviews would not be significantly more "unnatural."

Thus, we do not believe that the change in procedures, schedules, and questionnaires between data gathering at the Upstate Medical Center and the other sites will affect the nature of the data obtained, and the data from Upstate will be included in the analysis. We also do not believe that arranged interviews will be different in any significant way from those that occurred spontaneously. We will not attempt to study them separately.

Interviewer Skills and Training. We chose to use a moderately scheduled interview and moderate topic control in the stimulated recall sessions.

The interview was "scheduled" to the extent that the interviewer was given a number of questions for which answers had to be obtained. However, she was to ask the questions at the most appropriate points during the replay of the videotape of each interview or not ask them at all if answers were spontaneously offered by the interviewee. Thus, the order in which answers were obtained varied from one session to another. In addition, the interviewer was expected to ask about anything that happened which she thought might be important to the conduct of the interview, and she was to encourage the requesters or librarians to volunteer comments on anything that they thought was important. Thus, scheduled questions were specified, but unscheduled questions were also used and the order in which questions were asked was determined by the interviewer.

The topics we were interested in were 1) the requesters' and librarians' assessment of how well tasks were accomplished during the interview, 2) observations of verbal and nonverbal behaviors that helped or hindered, and 3) the importance that requesters and librarians attributed to the accomplishment of some tasks. Our interviews are described as having moderate topic

control because predetermined questions (discussed in more detail in a later section of this report and listed in Appendixes C and D) were used, but requester, librarian, and interviewer insights were also pursued.

Since the interviewer's judgment played a large role in the conduct of the stimulated recall session, we sought and found an experienced medical librarian to serve as the interviewer and as a research associate on the project. That person was Mrs. Carol Wargula, a medical librarian with experience in computer-based services, presearch interviewing, and medical librarianship in general. She took a leave of absence from her position as clinical librarian at Children's Hospital in Buffalo to work on the project.

Her training in interviewing skills, prior to the final pretest, involved 1) readings in interviewing texts, 2) briefings by the project director and by another interviewing expert, and 3) practice interviews followed by reviews of those interviews with the project director. The latter was an interactive process that involved developing the pre-determined questions and the interviewer's skills.

Review of the stimulated recall sessions from the final pretest at Upstate confirmed that the interviews were being conducted as planned. In addition, the project director periodically reviewed audio tapes of selected sessions following visits to each of the first few sites.

We believe that we succeeded in obtaining the specific information that we were looking for while allowing freedom for unexpected information to emerge as a result of insight by the requesters, the librarians, and our interviewer.

IV. Procedures in Each library

Initial Contact. Our initial contact with each library came prior to funding for two libraries and during the project for the other five. By letter and by telephone, a project staff member explained the objectives of the project and the role that the site library would play. Each library was sent a copy of the narrative portion of the proposal and a brief, two-paragraph, description of the project.

Publicity. Once an agreement was reached and the date of our visit was confirmed, multiple copies of a letter to the requester explaining the project were sent to the various sites for distribution about two weeks before our arrival. A copy is included as Appendix A. These letters were posted where they would be seen by as many potential requesters as possible. In addition, two posters were designed to aid in publicizing our presence while at the sites. When appropriate, the posters were displayed in the area where videotaping was taking place to make clear to potential requesters what was going on.

Inducements. One of the major concerns at three of the consenting libraries was the expense of undertaking such a project. Since the cost of computer time was the major issue, the project agreed to pay up to $150.00 to help defray these expenses at each of these three libraries.

The University of Illinois asked for partial payment of the cost of the searches; Northwestern for off-line and printed page costs; Hahnemann for total expenses. Upstate Medical Center, VA Hospital, Ellis Hospital and New Rochelle Hospital absorbed the cost of the searches in their library budgets.

Scheduling. At the pretest site and at the first few regular sites we tried to rely as much as possible on requesters who came in for searches at their own initiative. However, we found that 1) we were not getting to videotape as many interviews as we had hoped, 2) we could not conduct stimulated recall sessions immediately for all requesters, and 3) it was difficult to get requesters back for stimulated recall sessions if we could not conduct them immediately.* Thus, we started scheduling interviews at about one-hour intervals. This usually left enough time to videotape the interview and to immediately do the stimulated recall with the requester. Prior to, and during our visit, the librarians contacted potential requesters and set a specific time for them to come in for the interview and associated activities. This revised procedure proved highly successful and, as was discussed previously, did not adversely affect the data obtained.

Stimulated recall sessions with each librarian were conducted after all interviews with the librarian had been videotaped. This usually occurred as the last activity during our visit except when there was more than one librarian at a site. In the latter case, some librarians' sitmulated recalls were conducted earlier in the week after they had completed all of their in-interviews that we were going to videotape.**

Logistics. The procedure followed at each library was designed so that one stage of the data gathering flowed naturally from the other. An Interview

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*Only one of six requesters actually returned for the stimulated recall session if it could not be held immediately following the interview either because we could not do it then or because they could not spare the time then.

**There was one exception to the above procedure. At the University of Illinois, one librarian was ill on Friday. We returned on Tuesday of the next week to conduct the stimulated recall session with her.

Log was maintained by the interviewer with information about the conditions of the presearch interview and stimulated recall session recorded. The Interview Log is included as Appendix B.

The procedure itself was as follows. The librarian signed a consent form before any videotaping began. As each requester arrived, the interviewer identified herself and gave a brief description of the project. After the requester signed a release form, the presearch interview was videotaped. Immediately after the interviewing, a satisfaction form was given to the librarian, and a satisfaction form and requester information form was given to the requester. The librarian filled out the form in her/his office. The requester filled out the forms at a convenient, nearby location. The interviewer then explained the stimulated recall procedure and conducted the session with the requester. All forms were then collected and a packet of forms was created for each interview.

At the completion of all the interviews, the librarian was given the task analysis and background information forms to complete. The librarian signed the final consent form and went through the stimulated recall session.

The stimulated recall session with each librarian lasted approximately two hours. Only two interviews could be adequately covered in this time period without the librarian tiring. Aware of this limitation, the interviewer chose two interviews which represented the normal behavior of the librarian.

If a requester felt the interview with the librarian was inadequate or if the interviewer had noticed something unusual about one interview, that interview was viewed. If all the interviews for any one librarian were similar, the librarian was allowed to select the interviews she wanted to discuss.

In five of the seven sites, the stimulated recall sessions were held in a location separate from the room where the videotaping was done. These rooms were usually on another floor of the library. At Hahnemann and at the Veteran's Administration Hospital, the stimulated recall sessions and the videotaping of interviews were held in the same room using one equipment set-up. The librarian excused herself after the interview, and the requester stayed with the interviewer completing questionnaires and the stimulated recall session.

All the stimulated recall sessions with the librarian were held in the same room used for the stimulated recall sessions with the requester.

Length of Time Spent at Each Site. Ordinarily, time spent at each library was five consecutive days, Monday through Friday. Exceptions to this were:

Upstate Medical Center - five days total with interviews conducted four days in one week and one day the following week

Ellis Hospital - one day

New Rochelle Hospital - two days

Project Staff Members Present at Sites. The one constant at each site was the research associate who served as interviewer. The director of the project was present for the first day at each site except at Northwestern when scheduling conflicts prevented him from being there.

At three of the sites, Upstate Medical Center, the University of Illinois, and Northwestern, an assistant was present to help with the videotaping and distribution and compiling of forms. This worked out well since the assistant could videotape an interview while the interviewer conducted a stimulated recall session with another requester in another location. The assistant escorted the requester to the stimulated recall room and brought all the forms along.

Data Obtained. Figure 7 describes the data that were obtained.

Figure 7. Data Obtained.

Site	# of Interviews	# of Requesters	# of SR with Reqs.	# of Librarians	# of SR with Libs.
Upstate	6	6	5	2	2
Ellis Hospital	6	6	0*	1	0*
VA Hospital	10	9**	10	6	6
Univ. of Ill.	15	15	12	5	5
Northwestern	18	18	14	2	2
Hahnemann	19	19	18	2	2
New Rochelle	8	8	8	1	1
TOTAL	82	81	67	19	18

* Faulty equipment; stimulated recall sessions were conducted but the audio records of the sessions were lost.

** One requester requested two different computer searches. Statistics in other tables correspond to number of interviews (N=82).

Recommendations for Improving the Procedures. Some improvements were incorporated in this project and were described above. Others are discussed here for consideration in future research of this type.

Scheduling of interviews at one-hour intervals was adopted during the project instead of taking requesters who came in at their own initiative. As was discussed above, we do not see any advantage in taking "spontaneous" requests only. Scheduling interviews does not degrade the data but does make data gathering more efficient.

We did not use audio-visual technicians to videotape the interviews and to audiotape the stimulated recall sessions. We lost some data due to equipment failures which probably could have been avoided if a technician had been present. Also, the quality of both the videotapes and the audiotapes is adequate for our purposes but could be improved if a technician were used. Lighting and extraneous sound problems were encountered at several sites. They were adequately solved by our staff, but could have been better solved by a technician. For this project the additional cost of using a technician would not have been justified, but future researchers should consider this option.

We did not provide back-up personnel for our interviewer who had on-site responsibilities. There was a tradeoff that had to be made between the cost of back-up personnel and the possible loss of data or inconvenience in rescheduling due to illness or other emergencies. We did not lose any data, but Mrs. Wargula did work for several days at one site while not feeling well. Future researchers should consider this tradeoff in planning this type of data gathering.

V. Stimulated Recall Procedures with Requesters and with Librarians

The purpose of the stimulated recall sessions was to obtain as much information as possible from the requesters and the librarians about the tasks that should be accomplished in the interview and the behaviors that facilitated or interfered with the conduct of the interview.

To accomplish this with requesters, the videotape of each requester's interview was viewed by the project interviewer and the requester. The project interviewer stopped the videotape at what seemed to her to be appropriate points and asked both pre-determined and spontaneous questions. A medical librarian was especially hired for this job in order to take advantage of a professional's knowledge of topics being discussed, search service in medical libraries, and the presearch interview itself. The interviewer was expected to obtain responses for all of the pre-determined questions but not necessarily to actually ask all of the questions. Responses were frequently volunteered by requesters. In addition, the interviewer was expected to ask questions which she thought would be revealing based on what she saw happening in the interview. The requester was also asked to volunteer observations and comments and to ask for the videotape to be stopped at any time. Thus, the procedure insured that certain information would be obtained, and the procedure plus the interviewer's professional experience insured that the information obtained could go beyond what we had the foresight to seek.

Pre-determined questions were written for each of the major tasks that we had identified as being important in presearch interviews. We asked for 1) an assessment of how well the tasks had been accomplished, 2) identification of verbal and nonverbal behaviors that facilitated or inhibited the accomplish-

ment of some of the tasks, 3) the importance or appropriateness of some of the tasks for the interview, and some overall summary information. Appendix C lists the pre-determined questions.

To accomplish the same purpose with the librarians, exactly the same procedure was used except that videotapes of two or three interviews were viewed. The predetermined questions asked were exactly analogous to those asked of requesters but worded appropriately for the librarians. Assessment of how well the tasks had been accomplished asked for the librarian's assessment (rather than the requester's assessment). Identification of verbal and nonverbal behaviors retained the same focus on librarian's or requester's behaviors. Thus, librarians were asked to identify their own behaviors if requesters had been asked about the librarian's behaviors, and librarians were asked to identify requester's behaviors if requesters had been asked about their own behaviors. Questions about importance of tasks asked for importance to the librarians (rather than importance to the requesters). Questions asking for overall summary information asked for comments on the librarian's own behavior or behavior of librarians in general, the same as was asked of requesters. Appendix D lists the pre-determined questions for librarians.

VI. Questionnaires and Permission Forms

Satisfaction Measures. Requester satisfaction and librarian satisfaction were measured with a one-page, self-administered questionnaire. The same nine items were used on both questionnaires, but the introductory statements were slightly different. The satisfaction questionnaire for requesters is included as Appendix E; for librarians, Appendix F.

Information About the Requesters and the Librarians. Self-administered questionnaires were also used to obtain information about each requester and each librarian. The requester information questionnaire is included as Appendix G; the librarian information questionnaire as Appendix H.

Task Analysis Questionnaire. Previous research suggests tasks that must be performed in some or all interviews. We used a self-administered task analysis questionnaire to obtain each librarian's estimate of how important each of 25 tasks is in presearch interviews generally. We also solicited suggestions of tasks to add to the list. The Task Analysis questionnaire is included as Appendix I.

Permission Forms. One form for users and two for librarians are included as Appendixes J and K, respectively. The librarian signed the first form prior to any videotaping and the second after all videotaping was completed.

VII. TIME TABLE AND STAFF COMMITMENTS

Time-Table
(May 15, 1979-Jan 15, 1981)

Tasks	Staff
1. At Syracuse May 15-Oct 15, 1979 (5 months) Develop and pre-test procedures for a) videotaping presearch interviews including explanation to librarians, explanation to requesters, obtaining permission from each, and training videotape operators b) questionnaires to obtain subjective evaluations from librarians and requesters of "success" of the interview c) procedures for "stimulated recall" sessions d) questionnaires for face-to-face interviews of librarians and requesters to identify "tasks" which the librarian should perform	Crouch (50% - 5 months) Atherton (50% - 3½ months) Health Info. Prof. (100% - 2 months) Tessier (25% - 5 months) Research Asst. (100% - 3½ months; 50% - 1½ months)
2. At the four sites Oct 15, 1979-Jan 15, 1980 (3 months) Make preparations at the four sites for data collection. Obtain video and audio records of presearch interviews and other data as discussed in the research design	Crouch (50% - 3 months) Health Info. Prof. (100% - 3 months) Tessier (25% - 3 months) Research Asst. (50% - 3 months)

APPENDIX A

VIDEOTAPING IN THE LIBRARY

On Thursday, January 10, and Friday, January 11, we will be videotaping interviews in your library. The interviews to be videotaped are those that precede a computer-based literature search. The project is one of the first to systematically study the presearch interview and is sponsored by the National Library of Medicine.

The New Rochelle Hospital Library is participating in order to help us better understand how to train future librarians. I hope that as many users as possible will agree to have their interviews videotaped and that each user will also be able to meet with us after the interview to discuss it in some detail. It is from this discussion that we will learn how the interview can be improved.

I, the other researchers from Syracuse University, and the National Library of Medicine would appreciate your cooperation. If you have any questions, please feel free to talk with Mrs. Lambert about what we plan to do, or call or write me.

Wayne W. Crouch, Director
Presearch Interview Project
Syracuse University
Syracuse, N.Y. 13210

APPENDIX B

Interview Log

Case Number _____

Institution _____

Librarian _____

Requester _____

Date of Interview _____

Time of Interview _____

Interview videotape number _____

S.R. Session with the requester

(audiotape # _____) side 1 or 2

(date _____ time _____)

S.R. Session with the librarian

(audiotape # _____) side 1 or 2

(date _____ time _____)

Did the interview take place at the regular work place of the librarian?

YES NO

Comment:

Was a presearch form used?

YES NO

(If yes, obtain a copy of the completed form.)

Special Conditions

1. Was the user present for the online search?

   YES NO

2. Was the search request discussed at some point before the stimulated recall session?

   YES NO

3. Did the user see the output prior to the stimulated recall session? YES NO

4. Was there a charge for the search? YES NO

APPENDIX C
Pre-Determined Questions for Requesters

I. Task Questions

1. Formal Information Need - general	1. Do you feel the librarian understood your actual need for information?
V/NV Behaviors - L Get the requester's evaluation of what the librarian did or said and, when appropriate, suggestions he/she has for how the librarian could have done it better.	1.1 What did she/he do or say that makes you feel that way?
2. Formal Information Need - requester's explanation of need	2. How well do you feel you explained your information need to the librarian?
V/NV Behaviors - R Get the requester's evaluation of what he/she did or said and, when appropriate, suggestions as to what he/she could have done differently.	2.1 What was it about the way you explained your need that makes you feel that way?
3. Formal Information Need - purpose of the search	3. Do you think the librarian knew <u>why</u> you needed the information?
V/NV Behaviors - L Get the requester's evaluation of what the librarian did or said and, when appropriate, suggestions he/she has for how the librarian could have done it better.	3.1 What did she/he do or say that makes you feel that way?
Importance - R Find out how important the requester thinks it is for the librarian to have that information.	3.2 Is that important information for him/her to have?
4. Formal Information Need - depth and amount	4. Do you feel that the librarian understood what depth or how much information you wanted?
V/NV Behaviors - L Get the requester's evaluation of what the librarian did or said and, when appropriate, suggestions he/she has for how the librarian could have done it better.	4.1 What did she/he do or say that makes you feel that way?

Importance - R Find out how important the requester thinks it is for the librarian to have that information.	4.2 Is that important information for her/him to have?
5. Compromised Information Need - limitations	5. How do you feel about the limitations set for the search? For example, journals only, language, time period covered?
V/NV Behaviors - L Get the requester's evaluation of what the librarian did or said and, when appropriate, suggestions he/she has for how the librarian could have done it better.	5.1 What did the librarian do or say to establish those limitations?
6. Compromised Information Need - explanation of potential sources	6. How do you feel about the explanation of potential sources or data bases?
V/NV Behaviors - L Get the requester's evaluation of what the librarian did or said and, when appropriate, suggestions he/she has for how the librarian could have done it better.	6.1 What did she/he do or say that makes you feel that way?
Importance - R Find out how important the requester thinks it is for him/her to have that information.	6.2 Would you have preferred to know more or less?
7. Compromised Information Need - search vocabulary	7. How do you feel about the terms selected for the search?
N/NV Behaviors - L Get the requester's evaluation of what the librarian did or said and, when appropriate, suggestions he/she has for how the librarian could have done it better.	7.1 What did the librarian do or say in order to select terms?
8. Educating the User	8. Do you feel that you know everything you need to know related to the search?

V/NV Behaviors - L
Get the requester's evaluation of what the librarian did or said and, when appropriate, suggestions he/she has for how the librarian could have done it better.

8.1 What do you think it was about the way the librarian handled the interview that made you feel that way?

Importance - R
Find out whether the user wanted to know more or felt that too much was explained to him/her.

8.2 Would you have preferred to know more or less?

9. Administration Details

9. Do you know all you need to about what will happen following the interview?

V/NV Behaviors - L
Get the requester's evaluation of what the librarian did or said and, when appropriate, suggestions he/she has for how the librarian could have done it better.

9.1 What did the librarian do or say that makes you feel that way?

Importance - R
Find out whether the user wanted to know more or felt that too much was explained to him/her.

9.2 Would you have liked more of an explanation?

II. Socio-Emotional Questions

10. Interest and Willingness to Help

10. Do you feel that the librarian was interested in your request and willing to help?

V/NV Behaviors - L
Get the requester's evaluation of what the librarian did or said and, when appropriate, suggestions he/she has for how the librarian could have done it better.

10.1 What did the librarian do or say that indicated his/her willingness and interest?

Importance - R
Find out whether the requester thinks this is important.

10.2 Did it matter to you?

11. Librarian's Demeanor

11. Did the librarian's demeanor have any effect on the interview? For example, voice, appearance, eye contact, non-verbal behavior?

V/NV Behaviors - L
Get the requester's evaluation of what the librarian did or said and, when appropriate, suggestions as to what he/she could have done differently.

11.1 What was it about the librarian's demeanor that made you feel that way?

12. Requester's Demeanor

12. Did your demeanor have any effect on the interview?

V/NV Behavior - R
Get the requester's evaluation of what he/she did or said and, when appropriate, suggestions as to what he/she could have done differently.

12.1 What was it about your demeanor that had an effect?

13. Requester's Confidence in Librarian

13. Were you confident of this librarian's ability to do the search?

V/NV Behaviors - L
Get the requester's evaluation of what the librarian did or said and, when appropriate, suggestions as to what he/she could have done differently.

13.1 What did the librarian do or say that made you feel that way?

III. Summary Questions

14. Now that we have seen the entire videotape, is there anything that you would especially like to tell me about any part of the interview or the interview as a whole?

15. What advice or information would you like to give librarians or library students?

16. (No question for requesters comparable to question 16 for librarians.)

17. How necessary is it for the librarian to have some knowledge of the subject of the search?

APPENDIX D
Pre-Determined Questions for Librarians

I. Task Questions

1. Formal Information Need - general	1. Do you feel that you understood the requester's need for information?
V/NV Behaviors - L Get the librarian's evaluation of what she/he did or said and, when appropriate, suggestions as to what he/she could have done differently.	1.1 What is it that made you feel that you understood the request? How did you come to feel that way?
2. Formal Information Need - requester's explanation of need	2. How do you feel about the way the requester explained his/her need to you?
V/NV Behaviors - R Get the librarian's evaluation of what the requester did or said and, when appropriate, suggestions she/he has for how the requester could have done it better.	2.1 What was it about the way he explained the need that made you feel that way? Is there any other way it could have been handled?
3. Formal Information Need - purpose of the search	3. Did you know why the requester needed the information?
V/NV Behaviors - L Get the librarian's evaluation of what she/he did or said and, when appropriate, suggestions as to what he/she could have done differently.	3.1 What did you do or say to find out?
Importance - L Find out how important the librarian thinks it is for her/him to have that information.	3.2 Is that important information for you to have?
4. Formal Information Need - depth and amount	4. Do you feel that you knew how much information or the depth of information the requester needed or wanted?
V/NV Behaviors - L Get the librarian's evaluation of what she/he did or said and, when appropriate, suggestions as to what he/she could have done differently.	4.1 How did you come to feel that way?

Importance - R Find out how important the librarian thinks it is for her/him to have that information.	4.2 Is that important information for you to have?
5. Compromised Information Need - limitations	5. How do you feel about the limitations you set for the search? For example, journals only, language, time period covered?
V/NV Behaviors - L Get the librarian's evaluation of what she/he did or said and, when appropriate, suggestions as to what he/she could have done differently.	5.1 What did you do or say to establish those limitations?
6. Compromised Information Need - explanation of potential sources	6. How do you feel about your explanation of the data bases or the potential sources of information?
V/NV Behaviors - L Get the librarian's evaluation of what she/he did or said and, when appropriate, suggestions as to what he/she could have done differently.	6.1 How did you come to feel that way?
Importance - L Find out how important the librarian thinks it is for her/him to have that information.	6.2 Do you feel that the requester would have preferred to know more or less?
7. Compromised Information Need - search vocabulary	7. How do you feel about the terms selected for the search?
V/NV Behaviors - L Get the librarian's evaluation of what she/he did or said and, when appropriate, suggestions as to what he/she could have done differently.	7.1 How did you come to feel that way?
8. Educating the User	8. Do you feel the requester understood everything he needed to understand related to the search?
V/NV Behaviors - L Get the librarian's evaluation of what she/he did or said and, when appropriate, suggestions as to what he/she could have done differently.	8.1 What was it you did so that he/she would know everything he/she needed to know related to the search?

Importance - L Find out whether the librarian thinks the user wanted to know more or that he/she felt that too much had been explained.	8.2 Would the requester have preferred to know more or less?
9. Administrative Details	9. Do you think the requester knows what will happen following the interview?
V/NV Behaviors - L Find out whether the librarian thinks the user wanted to know more or that he/she felt that too much had been explained.	9.1 What did you do or say?
Importance - L Find out whether the librarian thinks the user wanted to know more or that he/she felt that too much had been explained.	9.2 Would the requester have liked more of an explanation?
II. Socio-Emotional Questions	
10. Interest and Willingness to Help	10. Do you feel you demonstrated an interest in the requester's need and a willingness to help?
V/NV Behaviors - L Get the librarian's evaluation of what she/he did or said and, when appropriate, suggestions as to what he/she could have done differently.	10.1 How did you do that? What did you do or say that indicated a willingness to help and an interest?
Importance - L Find out whether the librarian thinks this is important.	10.2 Did it matter to you?
11. Librarian's Demeanor	11. Do you think your demeanor had any effect upon the interview? For example, voice, appearance, eye contact, nonverbal behavior?
V/NV Behaviors - L Get the librarian's evaluation of what she/he did or said and, when appropriate, suggestions as to what he/she could have done differently.	11.1 What was it about your demeanor that made you feel that way?
12. Requester's Demeanor	12. Did the requester's demeanor have any effect upon the interview?
V/NV Behavior - R Get the librarian's evaluation of what the requester did or said and, when appropriate, suggestions for what he/she could have done differently.	12.1 What was it about the requester's demeanor that had an effect?

13. Requester's Confidence in Librarian

V/NV Behavior - L
Get the librarian's evaluation of what she/he did or said and, when appropriate, suggestions as to what he/she could have done differently.

13. Do you feel the requester had confidence in your ability to do the search?

13.1 How did you come to feel that way? Can you tell me what it is you did or said that gave him confidence in your ability?

III. Summary Questions

(Asked only after the last interview in the stimulated recall sessions with the librarians.)

14. Now that we have reviewed the videotapes of several interviews, what is there that you would especially like for me to know about presearch interviews in general?

15. What is the most important advice about the presearch interview you could give to an inexperienced librarian?

16. What is it that you frequently do or say that works well? Are there things that don't work well?

17. How necessary is it for the librarian to have some knowledge of the subject of the search?

18. How do the interviews that we videotaped differ from others that you normally conduct? (length, place, what you do or say)

19. Do you have anything else you would like me to know? Any other comments at all?

APPENDIX E

Presearch Interview Project
School of Information Studies
Syracuse University

The purpose of these questions is to obtain your opinions about your interview with the search analyst. Please indicate the degree to which you agree or disagree that each statement describes YOUR interview. Use the fourth or middle position to represent "neutral;" then moving out from the center, "slight" agreement, then "moderate" agreement, and finally, "strong" agreement.

1. I enjoyed working with the search analyst.

Strongly Agree _____:_____:_____ _____ _____:_____:_____ Strongly Disagree

2. The interview was very helpful to me.

Strongly Agree _____:_____:_____ _____ _____:_____:_____ Strongly Disagree

3. I was very dissatisfied with the interview.

Strongly Agree _____:_____:_____ _____ _____:_____:_____ Strongly Disagree

4. The search analyst understood my request when the interview was finished.

Strongly Agree _____:_____:_____ _____ _____:_____:_____ Strongly Disagree

5. Generally, it was not a successful interview.

Strongly Agree _____:_____:_____ _____ _____:_____:_____ Strongly Disagree

6. I expect the online search to be highly successful.

Strongly Agree _____:_____:_____ _____ _____:_____:_____ Strongly Disagree

7. I felt ill-at-ease during the interview.

Strongly Agree _____:_____:_____ _____ _____:_____:_____ Strongly Disagree

8. The search analyst understood my purpose for requesting a computer search.

Strongly Agree _____:_____:_____ _____ _____:_____:_____ Strongly Disagree

9. The interview fell short of my expectations.

Strongly Agree _____:_____:_____ _____ _____:_____:_____ Strongly Disagree

FOR PROJECT REPRESENTATIVE'S USE

Site: _____

Requester: _____

Case #: _____

APPENDIX F

Presearch Interview Project
School of Information Studies
Syracuse University

The purpose of these questions is to obtain your opinions about your interview with the person requesting the search. Please indicate the degree to which you agree or disagree that each statement describes the interview. Use the fourth or middle position to represent "neutral;" then moving out from the center, "slight" agreement, then "moderate" agreement, and finally, "strong" agreement.

1. I enjoyed working with the requester.

Strongly Agree _____:_____:_____ _____ _____:_____:_____ Strongly Disagree

2. The interview was very helpful to me.

Strongly Agree _____:_____:_____ _____ _____:_____:_____ Strongly Disagree

3. I was very dissatisfied with the interview.

Strongly Agree _____:_____:_____ _____ _____:_____:_____ Strongly Disagree

4. I understood the request when the interview was finished.

Strongly Agree _____:_____:_____ _____ _____:_____:_____ Strongly Disagree

5. Generally, it was not a successful interview.

Strongly Agree _____:_____:_____ _____ _____:_____:_____ Strongly Disagree

6. I expect the online search to be highly successful.

Strongly Agree _____:_____:_____ _____ _____:_____:_____ Strongly Disagree

7. I felt ill-at-ease during the interview.

Strongly Agree _____:_____:_____ _____ _____:_____:_____ Strongly Disagree

8. I understood the requester's purpose for a computer search.

Strongly Agree _____:_____:_____ _____ _____:_____:_____ Strongly Disagree

9. The interview fell short of my expectations.

Strongly Agree _____:_____:_____ _____ _____:_____:_____ Strongly Disagree

FOR PROJECT REPRESENTATIVE'S USE

Site: _____

Librarian: _____

Case #: _____

APPENDIX G

Presearch Interview Project
School of Information Studies
Syracuse University

REQUESTER INFORMATION

1. Which one of the following BEST describes what you wanted when you requested this computer search? Check one:

   _____ a reference with a particular fact or piece of information

   _____ a few good references for background, perspective or overview

   _____ a representative set of references on the topic

   _____ a pretty thorough search of the topic

   _____ everything on the topic

   _____ verification that you had already found all the references on the topic

   _____ other. Please describe:

2. On the list below please mark your PRIMARY planned use for the information with a "1" and any secondary uses with a "2." Use one "1" and more than one "2" if appropriate.

   _____ research

   _____ fulfilling academic requirements (coursework, thesis)

   _____ preparing an article, book, review or presentation

   _____ teaching

   _____ patient care or professional practice

   _____ other. Please describe:

3. About how many citations do you expect to receive from this computer search? _____

4. How many computer searches have you had done before this search, here or elsewhere?

   _____ 0 searches before this one

   _____ 1 search before this one

   _____ 2-5 searches before this one

   _____ 6 or more searches before this one

5. How would you describe your knowledge of the literature on the topic of this search?

   _____ this is a new field of literature to me

   _____ I have a little knowledge of the literature on the topic

   _____ I am somewhat knowledgeable about the literature on the topic

   _____ I am already quite knowledgeable about the literature on the topic

6. Please check your primary status:

_____ Medical School faculty
_____ Medical clinical faculty
_____ Other faculty
_____ Lecturer, instructor, teaching fellow, post graduate fellow
_____ Physician
_____ Medical staff (resident, intern)
_____ Medical student
_____ Graduate student
_____ Undergraduate student
_____ Administrator
_____ Other. Please describe: _____

7. Are your responsibilities primarily:

_____ Academic
_____ Clinical
_____ Other. Please describe: _____

8. Please indicate your academic discipline

_____ Medicine
_____ Nursing
_____ Public health
_____ Other. Please describe: _____

FOR PROJECT REPRESENTATIVE'S USE

Site: _____

Requester: _____

Case #: _____

APPENDIX H

Presearch Interview Project
School of Information Studies
Syracuse University

LIBRARIAN INFORMATION

1. How many years of general reference experience do you have?

   _____ less than 1 year
   _____ 1-5 years
   _____ more than 5 years

2. About what percent of your work time do you spend on activities related to computer-based searching? _____%

3. About how many computer searches do you do each week, on the average? _____

4. What training have you had for computer-based searching?

   _____ NLM course
   _____ On-the-job training
   _____ Library school
   _____ Other: _____

5. How often do you attend update sessions?

   _____ more often than once a year
   _____ about once a year
   _____ less often than once a year
   _____ never

6. How long have you been doing computer-based literature searching?

   _____ less than 1 year
   _____ about 1 year
   _____ about 2 years
   _____ about 3 years
   _____ more than 3 years

7. For each of the following, please circle your usual procedure.

   a. The interview occurs in your office.

      ALWAYS FREQUENTLY SELDOM NEVER

   b. The interview occurs in the user's work place.

      ALWAYS FREQUENTLY SELDOM NEVER

   c. The user is present when the search is run.

      ALWAYS FREQUENTLY SELDOM NEVER

   d. A search evaluation from the user is obtained.

      ALWAYS FREQUENTLY SELDOM NEVER

8. Have you ever worked as a clinical librarian? YES NO

FOR PROJECT REPRESENTATIVE'S USE

Site: _____

Librarian: _____

APPENDIX I

Presearch Interview Project
School of Information Studies
Syracuse University

TASK ANALYSIS

The following are tasks that may or may not be important for you to accomplish in the presearch interview. Please rate each task based on all of your experience conducting presearch interviews.

Choose one response for each item.

1. Must be accomplished in all interviews.
2. Must be accomplished in almost all interviews.
3. Must be accomplished in some interviews.
4. Very seldom needs to be accomplished in interviews.
5. Never needs to be accomplished in interviews.

1. Clarify the initial description that the requester gives of his information need. _____

2. Find out why the requester needs the information. _____

3. Find out how much information the requester needs. _____

4. Find out what information the requester already possesses. _____

5. Establish the publishing years of interest to the requester. _____

6. Establish language limitations of the requester. _____

7. Establish type of publication needed or wanted. _____

8. Establish how soon the information is needed. _____

9. Determine the requester's previous library experience or library expertise. _____

10. Discuss potential data bases with the requester. _____

11. Discuss potential search terms with the requester. _____

12. Discuss the potential search strategy with the requester. _____

13. Discuss the options of free text and controlled term searching. _____

Choose one response for each item.

1. Must be accomplished in all interviews.
2. Must be accomplished in almost all interviews.
3. Must be accomplished in some interviews.
4. Very seldom needs to be accomplished in interviews.
5. Never needs to be accomplished in interviews.

14. Discuss Boolean logic. _____

15. Discuss fees or billing procedures. _____

16. Discuss print-out formats available. _____

17. Make arrangements for or explain delivery of the results of the search to the requester. _____

18. Arrange for an evaluation of the results of the search by the requester. _____

19. Appear willing to help the requester. _____

20. Give the requester a chance to express satisfaction or dissatisfaction. _____

21. Give the requester a chance to ask questions. _____

22. Encourage the requester to return for additional assistance, if necessary. _____

23. Appear interested in the requester's need for information and his intended use of it. _____

24. Keep in overall control of the interview. _____

25. Avoid unduly influencing the nature of the requester's information need. _____

Choose one response for each item.

1. Must be accomplished in all interviews.
2. Must be accomplished in almost all interviews.
3. Must be accomplished in some interviews.
4. Very seldom needs to be accomplished in interviews.
5. Never needs to be accomplished in interviews.

Please list other tasks that you feel you must accomplish in at least some interviews. Rate each one as you did those above.

26. _____

27. _____

28. _____

29. _____

30. _____

31. _____

Use another sheet if necessary.

Comments:

FOR PROJECT REPRESENTATIVE'S USE

Site: _____

Librarian: _____

APPENDIX J

Presearch Interview Project
School of Information Studies
Syracuse University

I hereby give my consent to have my interview with _____ on _____ videotaped. I fully understand the purposes of the project and further understand that my videotaped interview will be used in accordance with the following stipulations:

1. neither my name nor any personal or professional information about me will be made known to any person(s) other than staff members of the research project who will treat that information as confidential, and
2. the purpose of the analysis of my videotaped interview is to eventually improve upon the way librarians and library users communicate with one another, and
3. all, or any part, of my videotaped interview may be included on a training tape to be used in training professional librarians or library students, and
4. I retain the right to have my videotaped interview erased and not included in the study if I so stipulate after the interview is completed.

Signed _____ Date _____

Witnessed _____ Date _____

APPENDIX K

Presearch Interview Project
School of Information Studies
Syracuse University

I hereby give my consent to have my interviews with various requesters videotaped. I fully understand the purposes of the project and further understand that my videotaped interviews will be used in accordance with the following stipulations:

1. neither my name nor any personal or professional information about me will be made known to any person(s) other than researchers who will treat that information as confidential,

2. the purpose of the analysis of my videotaped interview is to eventually improve upon the way librarians and library users communicate with one another,

3. the videotape will not be used for any purposes other than research without additional permission from me, and

4. I retain the right to have my videotaped interview erased and not included in the study if I so stipulate after the interview is completed.

Signed _____ Date _____

Witnessed _____ Date _____

Presearch Interview Project
School of Information Studies
Syracuse University

I previously gave my consent to have my interviews with various requesters videotaped. _____ interviews were videotaped. They are covered by my consent and are listed below.

Requester	Date of Interview

Signed _____ Date _____

Witnessed _____ Date _____